

How do YOU get started?

- Ensure that you and your contractors have completed the HSPD-12 process
- Sign up for ePM Training with your ePM Regional Coordinator
- Submit the appropriate access forms
- Go to the ePM on PBS InSite: <http://insite.pbs.gsa.gov/epm>

Where do YOU find help?

- Help Desk: 1 (866) 367-7878
- E-mail: epmsupport@gsa.gov
- Quick Reference Guides for different tasks in ePM (ePM on PBS InSite at the link above)
- Training Videos on PBS Portal (ePM on PBS InSite at the link above)
- External Training Videos are on Meridian's website: <http://www.meridiansystems.com/epminfo/videos/index.asp>
- Contact us at: epminfo@gsa.gov



What is the status of ePM?

- The ePM system is operational and ready for use by all project teams
- Training of Project Teams commenced in September 2009 with a dedicated onsite trainer for each Region
- Minimum requirements and recommendations for system use have been distributed (<http://insite.pbs.gsa.gov/epm> - under Training and Support tab)
- GSA Baseline 1.0 went into the production environment on 4/20/10

What is coming up for ePM?

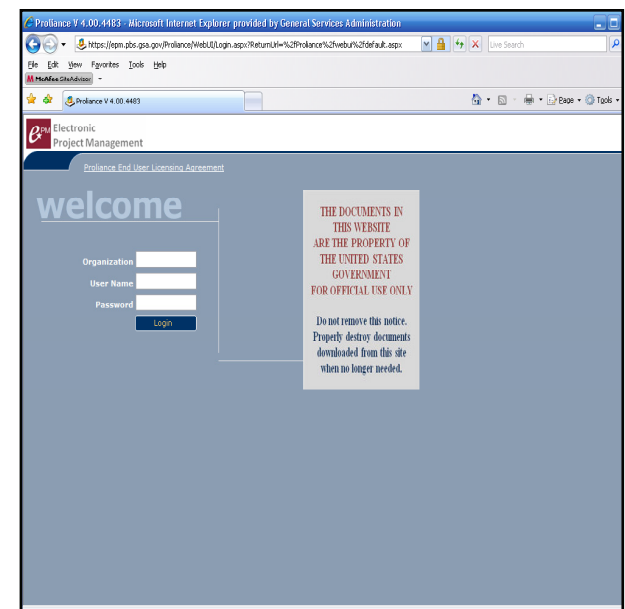
- Initial integration with PIP, IRIS and STAR data via BI/BIS
- Updates to Budget/Funding/Cost tracking
- Increased functionality with the Schedule Import Tool
- Enhanced user interfaces, basic reporting and dashboards
- Build 1.1, 1.2, and 1.3 are scheduled to be operational May, June, and July, respectively

ePM

Site URL: <https://epm.pbs.gsa.gov/proliance>
Help Desk (866) 367-7878
epmsupport@gsa.gov



Electronic Project Management (ePM)



What is ePM for the PM?

- ePM is a web-based electronic Project Management (ePM) system for Capital and Small Projects
- A secure repository for all project information and documents
- A collaborative Tool for the Project Team (including A/Es, CMs, and GCs)
- The generic terminology of “ePM” for the COTS product Proliance, which is the Enterprise version of Meridian’s Prolog application
- A Regional and National Reporting Tool

How is ePM beneficial Nation-wide?

- Keeps all project information in one system for all projects nationwide
- Allows regional as well as national reporting
- Maintains consistency across business lines and Regions
- Establishes clear and comprehensive information to customers

Quick Reference Guides (QRG's)

Several QRGs have been developed to assist users. These guides are broken down to match the applications in ePM:

- Office Management
- Contract Management
- Budget and Cost Management (BCM)
- Field and Schedule Management

ePM
ePM Quick Reference Guide #12

RFI Creation

What are RFIs?

ePM Request for Information (RFI) documents are used to capture project related questions and associated answers. An RFI contains a question, an answer, cost and schedule impacts. Additional information, such as photos, sketches and drawings can be attached for clarification.

RFIs are designed to track the information most critical to the GSA. Workflows and Activity Logs allow you to track the progress and status of each request. Using Attachments and references to other documents, the person providing a response to the RFI receives all the information they need to provide an answer. ePM tracks all RFIs to make sure nothing is missed. ePM creates numerically sequential RFI logs, which you can sort and search to quickly find a specific RFI.

Who Will Use This?

- General Contractor
- Construction Manager
- Architect/Engineer
- Project Manager

Create a Request for Information (RFI)

- Log into ePM as a user with the RFI Creator security role, then navigate to the appropriate project.
- Navigate to Applications > Office Management > RFIs to display the RFI register.

The screenshot shows the ePM application interface. On the left, there is a sidebar menu under the heading "APPLICATIONS". The menu items listed are:

- Budget & Reporting
- Contract Management
- Field Management
- Office Management
- Correspondence
- Design Documents
- Design Submittals
- Hiring Register
- RFIs** (highlighted with a red arrow pointing from it)
- Schedules
- Submittal Packages

QRG12_RFI_Creation_OCT2009
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Some example QRGs are:

- RFI Creation & Approval
- Contract Creation & Approval
- Submittal Creation and Review
- Design Submission Review
- Anticipated Cost Reports

There are over 30 QRGs based on the most common tasks performed in ePM. These guides include step-by-step instructions and screen shots to help the user see how to perform that action. These documents are located on the ePM InSite page for GSA employees and on the Meridian site for Contractors or External users.

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